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Getting Started and applying for MSCA Fellowships

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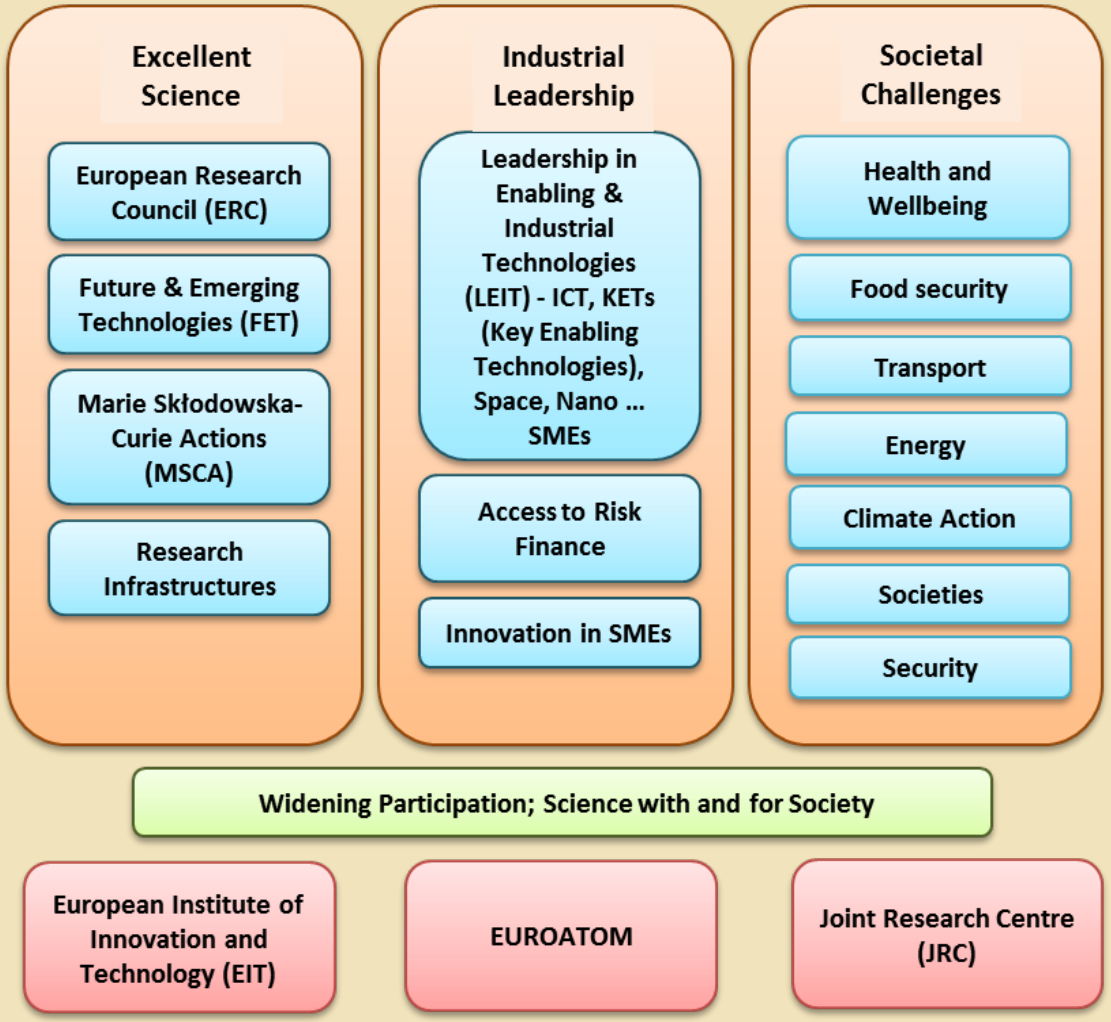
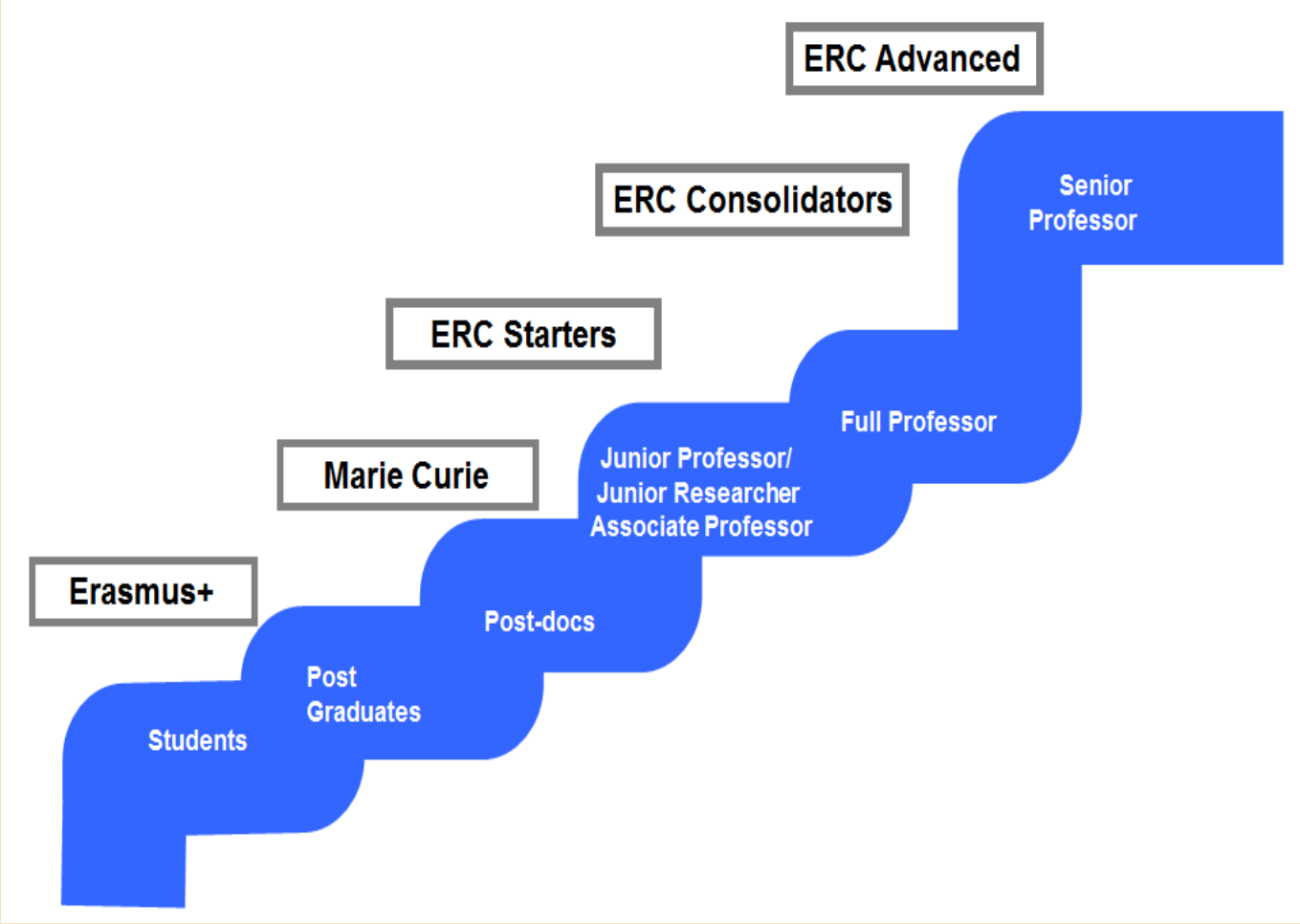
Reykjavik - September 2017

Horizon 2020 - Overview



Making a start - Fellowships



All these schemes are highly competitive and generally difficult to access successfully.

The key is to ensure that, at each stage you are the most 'fundable' applicant you can be.

More usual starting point is as Paid Researcher working on someone else's grant

Easier starting point but less autonomy

Short term security (normally 3 years but, exceptionally up to 5)

Key is to make transition from paid researcher to PI!

Becoming 'competitive'

- Understand the context of the funding available
  - All is driven by 'policy' - keep up to date with what is driving agendas
- Know what is coming up and what you are aiming for
  - Utilise funder websites (and internal services)
  - Sign up for relevant newsletters
  - Roadmap documentation (most areas of H2020)
  - Technology Platforms
    - http://cordis.europa.eu/technology-platforms/home_en.html
- Become indispensable
  - Offer to assist PI in the putting together of EU applications (in return for perhaps being a named researcher on the grant!)
  - Excellent training for large-scale applications as well as helping build contacts (for potential future reference)

Build your profile

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- Be active in relevant social media
- Negotiate attendance at key workshops & conferences
  - It is always easier to collaborate with someone you have already met!
- Any meeting is a potential networking opportunity
  - Also utilise internal opportunities (workshops etc)
- Join web-based communities
  - LinkedIn Groups (H2020; Marie Curie etc)
- Take advantage of funding awards for travel/conference attendance etc
  - UK: EPSRC New Ideas and Networking Grants; Oxford John Fell Fund
- Make a plan – identify mentors who can help you

Sources of help

- There is likely to be a mechanism for supporting EU applications at your institution – they should be the first port of call for questions
- Access internal training workshops on key funding schemes – even if you don't think you are ready
- Many funders offer free training for potential applicants – take advantage
- National Contact Points (NCPs) may run training events as well as offering advice on applications - Icelandic Centre for Research (RANNIS) http://www.rannis.is)
- EU participant portal for Guidelines for applicants
- Colleagues and contacts can give you the 'inside track'

Useful websites

- EU Participant Portal
  - http://ec.europa.eu/research/participants/portal/desktop/en/home.html
- National Contact Points
  - http://ec.europa.eu/research/participants/portal/desktop/en/support/national_contact_points.html
- ERC
  - http://erc.europa.eu/
- Marie Skłodowska-Curie actions
  - http://ec.europa.eu/programmes/horizon2020/en/h2020-section/marie-sklodowska-curie-actions

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Preparing for Individual Fellowships

Marie Skłodowska Curie Actions

Marie Skłodowska Curie Actions in H2020

- Operates on a ‘bottom-up’ basis
- Open to all research and innovation domains – from basic research to market take-up
- Mobility is a key requirement
- Aim: develop new knowledge / enhance skills of people behind research and innovation
- Dissemination and public engagement through public outreach activities
- PhD training and **individual fellowships**

Eligibility criteria & definitions

- **Mobility** – At the time of the relevant deadline for submission of proposals researchers shall not have resided or carried out their main activity in the country of their host organisation for more than 12 months in the 3 years immediately prior to the reference date

- **ER -** At the time of the call deadline (IF) must be in possession of a doctoral degree or have at least 4 years of full-time equivalent research experience

- **Academic Sector** -Includes universities and higher education institutions awarding degrees, non-profit research institutions (public and private), and international European interest organisations

- **Non-Academic Sector -** Includes any socio-economic actor not included in the academic sector (not just business and industry)

MSCA - Fellowship

- Completely bottom up – any excellent research project in any research / innovation field
- Calibre of researcher important
- Host institution & Supervisor important too!
- No age or career stage restrictions
- Researcher and host institution work together on application
- Grant **beneficiary** is the host institution
- Grants can exceptionally be portable and flexible
- Expectation of full-time research fellowship but can incl. some supervision, teaching etc.
- Requests for part-time working may be possible during grant negotiation / life-time of grant

Project Activities

- ‘Training-through-research’ at the host institution of Fellow’s choice, with named Supervisor
- Realistic and well-defined objectives in terms of research project
- Career advancement, including a Career Development Plan
- Develop and significantly widen the competences of the researcher, including multi-interdisciplinary expertise, transferable skills and inter-sectoral experience
- Optional secondment (should significantly add to the impact of the research project) of up to 3-6 months (in Europe)
- Public engagement and dissemination activities
- Two way knowledge exchange between Fellow and Supervisor (need to show both!)

How to apply

- Host organisation ('Supervisor' or other 'Contact') or the Fellow registers the draft proposal
  - PIC code
  - Draft acronym, draft summary, choice of panel
  - Involve the Department and EU Support team at Host Institution &
- Supervisor, other Contact or Fellow give each other access onto the proposal
- Proposal is completed
  - Administrative forms ('Edit forms')
  - Part B ('Download template' and 'Upload')
- Proposal is submitted by the Supervisor or other Contact at the host organisation
- Submission system checks ('Validate forms' and 'Print preview')
- 'Submit' as many time as required until the deadline

Proposal

- **PART B**
  - addresses the evaluation criteria
  - Becomes Annex I – Description of Action or the Grant Agreement
- **Structure of Part B for IF:**
  - Cover Page, Table of Contents
  - List of Participants
  - Summary
  - Excellence
  - Impact
  - Implementation

10 pages

- CV of the Researcher (max 5 pages)
- Capacities of the participating organisations (1 page beneficiary, 0.5pages partner(s))
- Ethical aspects
- Letters of commitment of partner organisations (GF only)

Evaluation Criteria

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EXCELLENCE

- Quality and credibility of the research action (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects
- Quality and appropriateness of the training and of the two-way transfer of knowledge between the researcher and the Host
- Quality of the supervision and of the integration in the team/institution
- Capacity of the researcher to reach or re-enforce a position of professional maturity/independence

IMPACT

- Enhancing the potential and future career prospects of the researcher
- Quality of the proposed measure to exploit and disseminate the action results
- Quality of the proposed measure to communicate the action activities to different target audiences

Evaluation Criteria

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IMPLEMENTATION

- Coherence and effectiveness of the work plan
- Appropriateness of the allocation of tasks and resources
- Appropriateness of the management structure and procedures, including risk management
- Appropriateness of the institutional environment (infrastructure)

IN ADDITION

- Gender aspects – in the research content as well as training
- Ethics (Section 7 of Part B)
  - Crucial for all research domains - to identify any potential ethical issues and describe how they will be addressed
  - All proposals considered for funding subject to Ethics Review

Approaching the proposal writing

- Work with your Supervisor / Fellow
- Keep the Guide for Applicants in front of you
- Treat the criteria as examination questions
  - It may feel repetitive – addressing issues from different angles
- Think about your evaluators
  - Clearly address the main objectives
  - Use clear and concise language
  - Explain country specific jargon
  - Provide them with the evidence they need
- Find 'critical friends' to review

Highly competitive – threshold is 70% but in reality you will need 90%+

The big questions

- How is your project interdisciplinary / multidisciplinary? Is it timely and relevant? How is it relevant to your research area?
- How will you show that your profile and experience make the project credible?
- Is your methodology appropriate, thoroughly described, well detailed, innovative, focused, challenging?
- Does it use recent techniques? Is it appropriate to objectives and well explained?
- If appropriate (and particularly where humans are involved in the research or as end users) can you demonstrate that you understand the importance of gender considerations?
- Are there ethical implications and if so, what is in place for approvals etc?

And more questions

- How will the fellowship enhance your career opportunities? What are your aspirations and how will the fellowship help? What will the fellowship give you that you could not get from another route? What new competencies / knowledge / practical advantages do you expect to acquire?
  - could include lasting (international) collaborations and networks, working in a world-renowned centre of excellence, exposure to the non-academic sector, linguistic skills, broadening of experience, specialisation, addressing a skills gap …
- What plans do you have for continued collaboration between host and fellow beyond the end of the project?
- What will the host institution – university / department / group / supervisor (as relevant) gain from the fellowship?
  - could include enhanced visibility for research excellence in your field, new networking, future possibilities for collaboration between institutions. Or you might bring unique skills and experience

And yet more questions

- Are the transfer of knowledge objectives clear, for you and for your host organisation?
- How will knowledge be shared? Will there be any teaching element to the fellowship? Will training include aspects of innovation (close to market elements, IPR management …)?
  - Note that training can include transferable skills as well as research – e.g. language, project and team management, gender awareness, teaching … (any teaching commitment must be small and relevant to your project).
- Can you demonstrate the supervisor's excellence as a research leader and his/her experience in effective supervision?
- Do you know their track record, including main international collaborations, publications, patents etc.?
- Can you describe the dynamism of the research group?
- Has your supervisor supervised students / fellows in the past? What have they gone on to achieve?

The host institution counts …..

- What is it that make the proposed supervision and host arrangements high quality?
  - Examples might include mentoring, measures that integrate new researchers into the Department, regular peer group workshops, existing interaction with the non-academic sector.
- Can you describe the nature and quality of your host research group/environment? How will you be fully integrated into it? How will you and your host gain from this integration?
- Is your project design realistic? Do you have a sensible timeline? Are your research objectives clear, feasible and practical? Is this reflected in your milestones and deliverables?
- How will resources – including your time - be used to ensure that the research and training objectives of the project will be reached?
- What monitoring mechanisms will there be to ensure that objectives are met? Your host department will have project financial management and progress monitoring mechanisms.

Host support for implementation?

- Do you know the infrastructure, logistics, in the host institution that will ensure good implementation of your project? At Oxford we include:
- provision of desk/laboratory space, including unrestricted access to supported PC facilities, email account, telephone
- assistance with completing the Marie Curie grant agreement and all reporting requirements through a dedicated Oxford European Team
- assistance with obtaining ethical clearance
- assistance with intellectual property issues through a dedicated Oxford IPR Team
- assistance with commercialising intellectual property arising from your research (patenting, licensing, spin-out companies) through the dedicated technology transfer office “Oxford University Innovation”
- free access to specialist libraries and collections within Oxford
- assistance with HR issues, national insurance registration, payroll and pension
- courses available free of charge through the Oxford Learning Institute, which offers training to researchers in research and transferable skills such as leadership and project management

Real evaluation comments

- 👍 The research and innovation related aspects are strong, both in how they address a challenging issue and how they complement the applicant's existing expertise
- 👍 There are clear objectives, discussion of the state of the art and good justification for the proposal
- 👍 The research methodology provides the perfect basis to achieve the goals outlined in the proposal
- 👎 The credibility of the research is not supported in sufficient detail
- 👎 The state of the art is not sufficiently addressed; related references from the literature are not specified
- 👎 The research objectives are too ambitious for the time frame of the fellowship
- 👎 The objectives and the project structure are not convincingly described
- 👎 The methodological approach is inadequately outlined with respect to the research objectives

Real evaluation comments

- 👍 The proposal clearly illustrates the new competences and knowledge that the researcher will gain from the fellowship. The training objectives of the proposal are clearly explained in the context of the research goals
- 👍 The proposed transfer of knowledge objectives, both from Host to fellow and from fellow to Host, are well described
- 👎 The means of knowledge transfer are insufficiently elaborated. The training program is not sufficiently described and personal goals for the training are not clearly identified
- 👍 The infrastructure of the host institutions is excellent and offers excellent support and resources
- 👍 The practical details as well as the academic supervision are appropriately addressed
- 👎 The hosting arrangements for the applicant are not provided in sufficient detail (e.g. housing, lab space, office space)
- 👎 The responsibilities of the supervisor are not fully described

Real evaluation comments

- 👍 The MC fellowship is very convincingly integrated in the long term career development plan of the applicant by emphasizing both further scientific qualification and application for larger research grants
- 👎 It is not made clear how the project will help the researcher to reach a position of professional maturity in research
- 👎 The impact of the fellowship on the researcher's scientific skills and new career perspectives is insufficiently addressed
- 👍 The description of work packages, the lists of major deliverables and milestones and the Gantt chart document the coherence and effectiveness of the work plan. The work plan includes training and teaching, which further substantiates its credibility
- 👎 The Work Plan lacks a detailed description of work packages, and the provided Gantt chart is insufficiently detailed, so it is difficult to fully assess the feasibility of the project

Real evaluation comments

- The institutional infrastructure is excellent for carrying the proposed research project. It would clearly provide the necessary materials, infrastructure and intellectual support for the successful implementation of the project
- The complementarity of the competencies of the applicant and the host are sufficiently described. The project will bring together the host's experience and the researcher's specialized expertise
- The institutional environment, the infrastructure and organizational arrangements have not been convincingly described
- Project organisation and management structure, including the financial management strategy, are not sufficiently described and inadequate for the execution of the project
- The proposal provides exhaustive information on project organisation, management structures at the host institution, financial management strategy and on the progress monitoring mechanisms in place

Final thoughts ….

- Become competitive
- Build your profile
- Plan ahead and be tough with yourself
- Make sure you are ready and give yourself the best chance of success
- Get help from your current and proposed host institutions
- Seek a mentor and critical friends
- Don’t despair – keep going
- The experience will be invaluable and one day you will succeed!